

**COUNCIL POLICY****CURRENT**

SUBJECT: RECORDS MANAGEMENT PROGRAM

POLICY NO.: 000-25

EFFECTIVE DATE: June 6, 1983

**BACKGROUND:**

There is a substantial need within the City of San Diego to elevate to a professional level the system of controlling paperwork, records creation, maintenance, usage and disposal. A program is needed to establish a classification and filing system which will result in effective information retrieval, disposal of unneeded records, transfer of inactive records to storage and preservation of essential records.

**PURPOSE:**

To establish a City-wide Records Management Program and to specify the procedures and responsibilities necessary for its implementation.

**POLICY:**

A Records Management Program within the City Clerk department, shall administer a uniform Records Management Program encompassing all City departments and offices. The program will include assistance in developing departmental Records Disposition Schedules (Records Transfer and Retention Schedules) with the objective of providing for proper disposition of City records; a records center for the storage, retrieval and disposition of non-current and in-active records; an archives for the preservation of historical permanent records; and off-site storage for the protection of vital records. A Records Management Officer shall be appointed by the City Clerk to serve as head of the program. This policy will be supplemented by an administrative regulation which will formalize in detail the procedures, duties and responsibilities of this program.

**A. GENERAL RESPONSIBILITIES**

1. Under the guidance of the City Clerk, the Records Management Officer shall develop policies, standards, and procedures to provide effective records management services. These duties include providing guidance to departments as they revise Records Disposition Schedules, providing assistance to City departments in solving records problems, and evaluating program effectiveness.
2. Each department head shall cause to be prepared a departmental records inventory and a Records Disposition Schedule.
3. The City Clerk shall administer the overall Records Management Program; provide guidance to all departments as needed; and review the program, taking corrective action as needed.
4. Department heads shall be responsible for the periodic review and updating of Records Disposition Schedules.

**B. RECORDS DISPOSITION SCHEDULE**

Each department head shall prepare, approve and submit to the City Clerk, the City Attorney and the City Council for approval, a Records Disposition Schedule. With guidance and assistance provided by the Records Management Officer, this preparation shall include:

1. A physical inventory and appraisal of all records.
2. A Records Disposition Schedule for each department.
3. An official, descriptive title for each record or record series.
4. An evaluation of each original record or record series and of each record retained in lieu of an original record, to determine if such records meet retention criteria to be specified by the City Clerk's office.
5. A periodic review of the Records Disposition Schedule.

C. RECORDS DISPOSAL

1. The Records Disposition Schedule shall constitute authority to destroy records. No original records or record copies shall be destroyed until they have been appraised and properly identified in the Records Disposition Schedule.
2. Each department head shall have authority to destroy unneeded duplicate records.
3. When microfilming original records for the purpose of destroying the original, the provisions of Calif. Government. Code section 34090.5 must be complied with, and the approval of the City Clerk must be secured.

D. VITAL RECORDS

Each department head shall establish systems for protecting vital records according to the provisions of this policy and the procedures established by the City Clerk's office.

E. CITY ARCHIVES

The Records Management Officer shall supervise the operation of the City Archives and will assist departments in the identification of records, review proposed Records Disposition Schedules to ensure that permanent records are adequately identified, collect and store department records having historical significance, develop and implement standards for the preservation of historical records, provide reference services, periodically examine records of historical value, and provide for their availability.

CROSS REFERENCE:

Administrative Regulation 85.10

Ordinance O-15761

Municipal Code Secs. 22.2601-22.2607

CITY OF SAN DIEGO, CALIFORNIA  
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HISTORY:

Adopted by Resolution R-250975 01/14/1980  
Amended by Resolution R-258594 06/06/1983